

## **Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030**

**Date:** February 9, 2026

**To:** Economic and Community Development Committee

**From:** General Manager, Economic Development and Culture

**Wards:** All

### **SUMMARY**

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Toronto's film and television production industry is highly valuable to the city, producing an annual direct spend as high as \$2.6 billion and supporting a skilled workforce of 40,000. The City has a legacy of strategic investments in Toronto's film industry over decades to achieve this success. Today, the result is that Toronto is one of the top five largest production hubs in North America, defined by world-leading talent servicing almost 3 million square feet of studio space. Toronto's industry is globally competitive, with local talent winning Oscars, Emmys, Golden Globes, and Canadian Screen Awards for work done here. This strength is the product of decades of investment and strategic support from the City of Toronto, other orders of government, domestic and international partners, and Toronto's film and television workers themselves.

Building on these strong fundamentals, Toronto's film industry is currently navigating a period of rapid change. Jurisdictions in the United States and around the world are increasingly competing for production investment through enhanced tax credits, expanded studio infrastructure, and other supports, which requires a coordinated and competitive response to protect Toronto's market share. The risk is compounded by recent efforts by the U.S. administration to retain American film and television production domestically and by growing trade-related uncertainty. As U.S. producers account for a majority of film production in Toronto, the City must continue to promote the local industry to U.S. producers while also growing domestic production through increased co-production investment by other international partners.

The sector also faces capital-specific challenges that constrain long-term growth. The development of new and expanded studio space has become increasingly difficult due to high land costs, global construction inflation, and tariffs on imported building materials, alongside broader economic uncertainty and shifting international trade conditions that have slowed new investment. To address these constraints and capitalize on future opportunities, the City is pursuing measures to enable a more film-friendly infrastructure and environment, such as stronger planning tools to protect and

expand core employment areas, streamlining regulatory processes to support film-friendly uses, and collaborating with industry to identify strategically located lands for future studio and production infrastructure development.

Evolving technologies, new distribution models, and global audience growth also present significant opportunities for Toronto to further strengthen its position as a leading screen hub. These technologies are rapidly accelerating, creating opportunities for innovation in production, post-production, and visual effects while carrying risks that require an informed, ethical, and inclusive approach. While current market conditions reflect a period of adjustment following the pandemic, recent labour disruptions, and trade-related uncertainty, these are understood as temporary market adjustments rather than permanent shifts. In this context, the City's focus is on future-looking actions that avoid short-term, reactive decisions and instead build out a resilient, film-friendly city that is well positioned for renewed growth as conditions stabilize.

To protect and grow Toronto's industry, a new five-year Strategic Plan for the film industry is needed in alignment with priorities identified in various Council-adopted City strategies, including, but not limited to:

- *Sidewalks to Skylines: An Action Plan for Toronto's Economy*, which calls to grow Toronto's global competitiveness in key anchor and high-productivity sectors, highlighting creative industries such as film;
- *Mayor's Economic Action Plan in Response to United States Tariffs*, which notes the need to 'support tariff-resilient sectors able to drive long-term economic growth and job creation', foregrounding creative industries within this group; and
- *Culture Connects: An Action Plan for Culture in Toronto*, which notes the need for sector-specific strategies for shaping new policies, programs, and investments in growing industries including film, music, public art, the visitor economy, and esports.

This report presents *Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030*, the new Film Strategic Plan for the City of Toronto. The Strategic Plan—which includes 13 actions, with metrics, across four strategic priorities—was developed through extensive engagement, and research and analysis on the current state of the film industry and the key factors to maintain Toronto's global competitiveness.

It sets out a high-level roadmap to expand studio and production capacity, workforce development, incentives, sustainability, and client outreach to meet growing demand and defend and grow Toronto's market share. It also aims to increase targeted support for the domestic production sector to diversify and stabilize the industry and to strengthen the City's operating conditions so that the Film Office can move at the speed of industry, securing long-term investment, quality jobs, and broad community benefits. Together, priorities and actions are intended to ensure that Toronto remains one of the world's leading and most film-friendly production centres through 2030 and beyond.

## **RECOMMENDATIONS**

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The General Manager of Economic Development and Culture recommends that:

1. City Council adopt *Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030*, as outlined in Attachment 1 to the report and request the General Manager, Economic Development and Culture to modify, adapt and innovate the implementation of actions as required in response to the changing state of the film industry.

## **FINANCIAL IMPACT**

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There are no immediate financial impacts resulting from the adoption of recommendations contained within this report. If adopted by City Council, implementation of the Strategic Plan's recommended actions, as detailed in Attachment 1, will be accommodated within the Economic Development and Culture (EDC) Division's annual budget beginning in 2026, including through the re-allocation of resources to support the plan's priorities where required.

In previous budget processes, EDC has secured and administered new and enhanced funding to support growth in creative industry, workforce development and infrastructure initiatives. EDC will continue to monitor the needs of the industry, and any incremental resource requirements including staffing impacts to advance recommended actions, if required, will be submitted for consideration against other City-wide priorities as part of future budget processes.

The Chief Financial Officer and Treasurer has reviewed this report and agrees with the information as presented in the Financial Impact Section.

## **DECISION HISTORY**

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At its September 15, 2025 meeting, the Toronto Film, Television, and Digital Media Advisory Board recommended that the Economic and Community Development Committee recommend that City Council endorse the 2025-2030 strategic goals in the presentation of the Film Commissioner and Director of Entertainment Industries and use them as the basis for the City of Toronto's renewed Film Strategic Plan spanning 2025 to 2030.

<https://secure.toronto.ca/council/agenda-item.do?item=2025.FB8.1>

At its May 20, 2025 meeting, the Film, Television and Digital Media Advisory Board received a presentation from Olsberg SPI for information. The presentation provided the findings from roundtables, consultations, surveys and jurisdictional research to inform the development of Toronto's Film Strategic Plan.

<https://secure.toronto.ca/council/agenda-item.do?item=2025.FB7.1>

At its February 6, 2025 meeting, the Film, Television and Digital Media Advisory Board received a presentation from Olsberg SPI, which outlined the research and engagement approach for a renewed Film Strategic Plan.

<https://secure.toronto.ca/council/agenda-item.do?item=2025.FB6.1>

At its November 13, 2024 meeting, City Council adopted Sidewalks to Skylines: An Action Plan for Toronto's Economy, which identified the growth of Toronto's global competitiveness in key anchor and high-growth sectors as a priority, where the creative industries is specifically named as one of the six key anchor and high growth sectors. <https://secure.toronto.ca/council/agenda-item.do?item=2024.EC16.2>

At its November 13, 2024 meeting, City Council adopted Culture Connects: An Action Plan for Toronto's Culture which recognized the need for sector-specific plans to play a primary role in the City support of given industries, such as film, and recommended that they be developed. <https://secure.toronto.ca/council/agenda-item.do?item=2024.EC16.1>

At its July 4, 2017 meeting, City Council adopted Spotlight on Toronto: A Strategic Action Plan for Toronto's Film, Television, and Digital Media Industry. This strategy became the basis for Film Office initiatives, and the structure and focus of the Toronto Film, Television, and Digital Media Advisory Board from then until the present day. <https://secure.toronto.ca/council/agenda-item.do?item=2017.ED22.4>

## COMMENTS

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Toronto's last film strategy, [Spotlight on Toronto: A Strategic Action Plan for the Film, Television and Digital Media Industry](#), was endorsed by the Toronto Film, Television and Digital Media Advisory Board ("Film Board") and adopted by Toronto City Council in July 2017. It charted a path to take film production value in Toronto from just over \$2 billion, where it stood in 2016, to the 2022 high of \$2.6 billion. In the eight years since City Council adopted *Spotlight on Toronto*, the strategy enabled the local industry to attract new production and investment, expand studio capacity, develop the local workforce and ultimately grow production value in Toronto and add thousands of jobs. Recently, however, Toronto's industry has faced challenges common to key production centres across the world—the impacts of the global pandemic, labour disruption, and most recently, changes to the international trade order. Current trends and global industry dynamics call for a new multi-year Strategic Plan to ensure that Toronto continues to thrive amidst a rapidly changing economic and industry landscape.

The first section below outlines the factors considered in developing the Film Strategic Plan, including stakeholder engagement and research. A summary of findings, with a focus on fundamentals, challenges and opportunities is presented. Additionally, assessments of existing City of Toronto support to the film industry and of the City of Toronto Film Office are presented as key considerations. The second section, focused on the new Film Strategic Plan, introduces its four strategic priorities and actions, alongside how they align with City of Toronto priorities as articulated in other Council-approved strategies. Finally, information on the metrics framework and next steps for the implementation of the Film Strategic Plan are presented.

## 1. Development of the New Film Strategic Plan

In preparing the City's new Film Strategic Plan, the City of Toronto's Film Office of the Economic Development and Culture (EDC) Division engaged Olsberg SPI, a world leading consultancy specialized in creative industries sector development, to conduct comprehensive research, jurisdictional scans, an analysis of the current state of film production in Toronto, and extensive industry engagement to inform the development of the new Film Strategic Plan. This process spanned nine months and the consultant's findings were presented to the Toronto Film, Television and Digital Media Advisory Board on September 15, 2025 in the report [Advancing Toronto's Screen Future: Key Findings for a Strategic Vision \(FB8.1\)](#). Staff from the Film Office also presented 2025-2030 Film Office strategic priorities based on the findings in the consultant's report, which were endorsed by the Toronto Film, Television and Digital Media Advisory Board. The consultant's report will be transmitted to the same meeting of Economic and Community Development Committee as this staff report, and presents a roadmap forward, recommending specific strategies and actions required for the City of Toronto to help enable Toronto's vibrant film sector and the thousands of quality jobs it creates to meet the challenges it faces today and into the foreseeable future.

### Engagement and Industry Consultation Highlights

Industry members were extensively consulted throughout the process of developing the Film Strategic Plan. As part of the consultation process, 7 roundtables were conducted with the participation of 43 local leaders in workforce development, post-production and VFX, sustainability, studios and infrastructure, domestic and service producers, animation, and evolving technologies. In addition, 25 one-on-one interviews were conducted with international and local clients and partners, and a targeted survey was circulated to 200 industry members. Olsberg SPI also presented on the progress of their work at the Toronto Film, Television, and Digital Media Advisory Board at its February 26, 2025 and May 20, 2025 meetings through items [FB6.1](#) and [FB7.1](#), respectively. In developing the Film Strategic Plan, the Olsberg team worked closely with staff of Economic Development and Culture and with the Film Strategic Plan Working Group, a group of local industry leaders assembled for their cross-sectoral expertise and insight.

Key findings from the consultation and engagement activities were as follows:

#### ***Strong Fundamentals***

Through the pandemic and the prolonged SAG-AFTRA and WGA labour disruption that followed, Toronto's screen industry demonstrated resilience:

- Direct production spend reached CA\$2.2 billion in 2019, dipped to CA\$1.5 billion in 2020 during the pandemic, then rebounded to a record CA\$2.5 billion in 2021 (a 13% increase from 2019) and CA\$2.6 billion in 2022.
- Relative to competing production hubs, Toronto's post-pandemic growth exceeded that of Los Angeles, where 2022 on-location shoot days were only 0.7% above 2019, and outpaced British Columbia, whose 2022 production spend of just over CA\$3.6 billion remained below its 2019 peak of CA\$4.1 billion.

This is attributed to the combination of strong fundamentals found in Toronto: attractive incentives, inventory of worldclass studio space, highly skilled workforce, excellent post-production and VFX facilities, and effective support from the City of Toronto. Toronto's outlook for 2025-2030 remains positive as the global entertainment and media industry is projected to grow at a compound annual growth rate of 3.7%. Early indications are positive as Statistics Canada data for Toronto showed exceptional year-end strength in the information and cultural industries cluster, with December employment +19.4% year-over-year.

### ***Significant Challenges***

Despite its strong fundamentals, Toronto's film industry faces a complex set of challenges:

- Uncertainty arising from ongoing trade tensions between Canada and the U.S. poses risks to Canadian production pipelines. This compounds the movement by the American industry and law makers to retain production in Los Angeles in particular.
- Toronto faces intensifying competition from other jurisdictions in the U.S. and across the world for service production business. Jurisdictions new to the sector see the value in this industry and are launching incentives and building studios, threatening Toronto's market share.
- High real-estate costs are constraining soundstage development in Toronto and challenging the ability of workers in these sectors to remain in the city due to the high cost of housing.
- Workforce pressures, driven by demographics and affordability, threaten the loss of senior crew and challenges in retaining new workers, affecting the talent pipeline.
- Global economic pressures, including rising construction costs, tariffs on imported building materials, and broader investment uncertainty, are slowing the pace of new studio infrastructure development and threatening long-term capacity growth.
- Evolving technologies are also causing uncertainty as they represent both an opportunity and a threat, depending on the industry segment.
- The City of Toronto Film Office operating model challenges its efficacy in some areas when compared to similar offices in comparable cities. This could impact market share given promotion and direct client engagement internationally are increasingly critical to retaining business.

### ***Opportunities for Growth***

There are several key opportunities to ensure the City is functioning optimally in the services and supports it provides to this valuable industry. This includes film permitting and other broader forms of sector support, such as facilitating housing that workers can afford, easing congestion that impacts business, and protecting employment lands. The industry consultation also found that the City of Toronto should continue to support the growth of studios to meet demand, accelerate the development of a diverse and inclusive workforce based on labour gaps, and support stable tax credits. As market dynamics have substantially changed, the Film Office must be empowered to have a more competitive approach to promoting Toronto's industry at key international markets and through marketing and communications initiatives throughout the year. As a priority,

the Film Office needs to diversify Toronto's client base and investors to mitigate against disruptions in international trade relations.

The domestic industry is a key pillar of Toronto's screen ecosystem, representing approximately 20-30% of total annual production spending in the city. This sector is under stress, seeing reduced commissions, and accordingly, lower production volumes, challenging long-term viability for some companies in this sector. With the potential for contraction in American production in Canada, increasing domestic production by stimulating international linkages and co-productions through proactive outreach and closely aligning with emerging provincial and federal strategies will be key activity for the Film Office to support domestic production.

### ***Assessment of City of Toronto Support***

Through research, consultations, and comparison to other jurisdictions, Olsberg SPI found the City of Toronto demonstrates a strong and sustained commitment to supporting and investing in its screen industry, ensuring it thrives as a major contributor to local employment, economic development, and cultural identity. As evidence, the consultants noted the City's efforts in such areas as planning, policy development, financial support, and coordinated cross-divisional efforts and partnerships, all seen as essential for the industry's continued success.

The success of Toronto's film industry in recent decades is attributable in part to City support, especially the effective collaboration across Divisions and Agencies. For film permitting and access to public realm, Transportation Services, Parks and Recreation, and Corporate Real Estate Management are key partners for the Film Office. City Planning has worked to protect employment lands and instituted frameworks such as Productions, Interactive and Creative (PIC) land use planning definitions that support industry presence and growth. Strategic Public and Employee Communications provides critical support in marketing efforts, and Environment, Climate and Forestry support production-related sustainability initiatives.

In terms of promotion of the industry, the presence of the Mayor and City Councillors on film missions is particularly valued by local industry partners as, locally, it sends a strong signal of the City's commitment and engagement with this sector, and, internationally, opens doors to investment opportunities and shores up investor confidence in Toronto's competitiveness.

### ***Assessment of the City of Toronto Film Office***

The Film Office within EDC is the City of Toronto's primary entity for the servicing and promotion of the local screen production industry. It has two essential responsibilities: (1) to facilitate production in the city; and (2) to grow the sector through promotion of the industry, and through programs and policies. Its remit covers film, television, visual effects, animation, and commercial productions.

Through the consultation process, feedback from industry stakeholders reflected a strong positive working relationship with the Film Office, with a combined satisfaction rate of 94%. Respondents were particularly positive regarding permitting services and

outreach initiatives such as missions in Los Angeles, the UK, and Ireland, and the Film Office's role in attracting and facilitating major studios such as Netflix and Amazon. Feedback is consistent that the City's Film Office is instrumental in enabling productions to operate efficiently in the city. The Film Office has built an exemplary reputation as a one-stop concierge service for American, other international and domestic producers.

Many stakeholders view the Film Office as an essential pillar of the Toronto screen industry, vital to maintaining a healthy, competitive and film-friendly screen ecosystem. However, stakeholders also note that to remain competitive in an increasingly challenging marketplace, the Film Office needs to be more active in promotion of Toronto's industry internationally. The consultants also found that, relative to competing jurisdictions, the Toronto Film Office's impact has been hampered by limitations such as the speed of its external communication and the frequency and reach of its promotional activities, including presence at key international markets where competing jurisdictions are increasingly active.

In comparisons with competitive jurisdictions, the consultant noted that greater operational flexibility and autonomy in its marketing and promotional activities would aid the Film Office to function competitively and move at the speed of industry. A total of 58% of surveyed respondents report that Toronto's Film Office is somewhat effective at keeping stakeholders regularly informed. Strengthening stakeholder engagement through clearer and consistent updates would help reinforce awareness of available resources and opportunities. To effectively support Toronto's film industry as a major economic and cultural driver for the city, the Film Office's marketing, communications, and content activities—as undertaken by the Communications Division—must operate as quickly and strategically as its peer film commissions by responding in real time to industry opportunities, engaging with domestic and international stakeholders, and positioning Toronto more proactively in an intensely competitive market.

The consultant concluded that stakeholders encourage Toronto's Film Office to maintain a consistent outward-facing role, attending international industry events to build partnerships, hosting local roundtables, and conducting missions to build visibility and attract new opportunities. This is an important way for the Film Office to promote Toronto's industry, stay attuned to evolving trends, and foster stronger connections with both domestic and international stakeholders, for Toronto to remain an industry leader.

## **2. Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030**

Given the consultant's findings as endorsed by the Toronto Film, Television and Digital Media Advisory Board, *Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030* identifies 4 strategic priorities:

1. Expand Ongoing Strategic Initiatives to Grow Toronto's Industry
2. Drive Expanded Marketing, Communications, and Client Engagement
3. Increase Support for the Domestic Production Sector

#### 4. Create Optimal Operating Conditions for the City of Toronto Film Office

The following sections provide a summary of each of the strategic priorities and examples of actions, followed by a section on strategic alignment with City of Toronto priorities, as outlined in Council-approved action plans and strategies. Further details on the actions, tactics, metrics (both on the performance of the sector and on implementing the Film Strategic Plan), financial impact and the timeline that the Film Office will undertake to implement the actions in *Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030* can be found in Attachment 1.

##### ***Strategic Priority 1: Expand Ongoing Strategic Initiatives to Grow Toronto's Industry***

Resulting from decades of targeted investment by the City, the industry, and other orders of government, Toronto has become a leading film production hub in North America and globally. As the competitive landscape for the production business intensifies, the fundamental strengths that drove Toronto's success must be maintained and grown. The pillars of any leading production hub are studio space, workforce, incentives, dynamic branding, strong international partnerships, outstanding customer service, sustainability, and ethical technological advancement. Each of these pillars were prioritized for action in the preceding Council-adopted strategy, *Spotlight on Toronto: An Action Plan for Toronto's Film, Television, and Digital Media Industry*, and the new proposed Film Strategic Plan seeks to maintain these strengths while also addressing emerging threats and opportunities.

Actions include:

- ***Action 1.1: Enhance Toronto's Position as a Film-friendly City:*** Ensure Toronto fully delivers on its identity as a 'film-friendly' city by engaging across Divisions and with Councillors to ensure the value of the film industry to the city is fully understood, and the many tools the City has to support the industry are fully leveraged to increase the benefits it provides to residents.
- ***Action 1.2: Support Studio Capacity to Meet Demand:*** Ensure Toronto's studio space continues to grow, relative to demand, to capture the full economic and employment opportunity available to the industry and the city. Toronto's industry can only be as big as its studio capacity allows it to be. Expanding studio space to meet demand allows Toronto to maintain and grow market share, resulting in more investment and jobs. Creating conditions for studio development is progressively more challenging as employment lands face pressure for redevelopment for housing and other uses and the cost of real estate is relatively high in Toronto.
- ***Action 1.3: Advance Demand-driven, Equity-focused Workforce Development:*** Toronto's workforce has the creative and competitive advantage of being both highly talented and very diverse, and the Film Office must help maintain Toronto's skilled workforce by developing or supporting effective and targeted workforce development initiatives, responsive to imperatives around equity and inclusion, labour demand, evolving technology, and awareness of workforce demographic shifts.

- *Action 1.4: Advocate for Stable and Competitive Incentives:* In collaboration with industry partners, advocate for tax credit stability and competitiveness with awareness of comparative international incentives and client insights and support the maintenance or growth of other incentives or funds that support infrastructure and local production capacity.
- *Action 1.5: Accelerate Sustainability:* Expand Toronto's work on sustainable production practices by building on existing initiatives and closing key gaps (e.g., EV infrastructure, renewables, circularity).
- *Action 1.6: Share Knowledge to Advance Engagement with Evolving Technology:* Toronto's Film Office should convene expertise and perspectives on evolving advanced technologies from across industry segments and develop information-sharing initiatives to support industry knowledge, discernment, and ethical applications of advanced production technologies (e.g., AI, virtual production, R&D).

## ***Strategic Priority 2: Drive Expanded Marketing, Communications, and Client Engagement***

One of the primary roles of any film office is to market and promote the jurisdiction it represents. Like agencies that promote foreign direct investment, film offices maintain or grow their jurisdiction's market share in part by data-driven and targeted outreach to clients outside their home market.

The City of Toronto's Film Office has a successful history of Missions to Los Angeles, and now to London and Dublin as well. The feedback received from the Mission's delegates and representatives has been positive and resulting investment has driven the growth of Toronto's film industry. In increasingly competitive and unpredictable market conditions, and facing the need shared by other high-growth industries to diversity trade markets and investment sources, greater international engagement on behalf of Toronto's industry would benefit the international profile of the local industry and help mitigate risks by diversifying sources of investment.

Existing Film Office initiatives such as the Mayor's Missions to LA, London, and Dublin, are well-regarded, as is xoTO House at TIFF. However, to be competitive, Toronto's industry needs to be marketed beyond these standalone initiatives, and ongoing communications can be more frequent, segmented, and responsive to time-sensitive industry issues and support strategic international engagement.

Toronto's Film Office will build on existing efforts by instituting a more consistent and proactive program of outreach, engaging industry and other levels of government as appropriate, including communications tools and channels, in-person and virtual events, trade missions, and travelling to participate in international screen festivals and markets, with the express goal of increasing Toronto's global competitiveness in the film sector while remaining one of the top five film-friendly cities in North America, per industry-approved indices. Additionally, the Communications Division and EDC will work together on a reallocation of existing resources to support a dedicated communicator able to aid in implementation of this strategy and improve communications and

marketing for the film sector, key audiences and the public. Dedicated communications resources will allow for improvements to be made in the Film Office's digital content, creative production output, and dissemination, leading to the increased presence of film industry-related activities on film-dedicated and city-wide channels and platforms.

Actions include:

- *Action 2.1: Maintain and Expand Successful Outreach Initiatives:* Maintain existing, successful approaches to in-market promotion and outreach while also responding to changing market dynamics by creating targeted, new initiatives to attract more international productions and diversify markets for Toronto's film industry.
- *Action 2.2: Increase Stakeholder Engagement:* Enhance communication strategies for key stakeholder groups by initiating regular forums, town halls and proactive outreach.
- *Action 2.3: Improve Access to Data for Communications, Decision-making, and Advocacy:* Advance evidence-based decision-making, advocacy, communications, and reporting by working both independently and with partners to improve data gathering and analysis.

### ***Strategic Priority 3: Increase Support for the Domestic Production Sector***

Toronto's domestic production industry is a creative powerhouse in which both Toronto and Canada take pride. Toronto's creators excel on the biggest stages in the world, telling stories that reflect Canadian values and perspectives. Increasing domestic production value will help diversify Toronto's film industry; an important effort in the face of rising U.S. economic protectionism. Yet, the domestic production sector faces specific challenges. According to the 2024 Profile Report produced by the Canadian Media Producers Association, there was a 14.9% drop in English-language Canadian content production from 2023 to 2024, in part due to decreased commissions from broadcasters and other buyers. While the domestic segment of the local film industry benefits from the Film Office's work to support the sector at large through film permitting, workforce development and other supports for a 'film-friendly' city, more targeted supports for domestic production are needed.

Actions include:

- *Action 3.1: Collaborate with Industry to Identify Actionable Challenges:* Maintain consistent communication points with the domestic industry in order to remain informed of challenges as they evolve to enable intervention when City support can be appropriate and effective.
- *Action 3.2: Advocate for Continued Government Support:* The City of Toronto should advocate to other orders of government for continued and enhanced investment in critical provincial and federal funding programs for domestic production, including collaboration on outreach to key international markets.

#### **Strategic Priority 4: Enhance Film Office Operating Conditions**

With the creation of a new five-year Film Strategic Plan, Toronto's Film Office stands at a pivotal moment to build on its legacy of sector-leading service and having unique advantages of being located within the municipal government of one of the world's most innovative, fast-growing, and multicultural cities.

Looking ahead, strengthening the Film Office's operations is essential to sustain Toronto's reputation as a premier film destination, foster continued growth and competitiveness, and respond proactively to emerging industry challenges. The Film Strategic Plan responds directly to Toronto's current industry strengths and challenges—including intensifying competition, shifting market demands, and stakeholder feedback—identified through extensive industry consultation and analysis. By enhancing operational efficiency, deepening collaboration across City Divisions, and expanding both responsiveness and marketing capacity, the Film Office will be positioned to deliver excellent client service and accelerate the sector's contributions to Toronto's economy and cultural life, ensuring broad community benefit into the future.

Actions include:

- *Action 4.1: Ensure Awareness of the Industry's Value:* Continue to ensure awareness across Divisions, City leadership, and among Councillors of the alignment of Film Office goals and film industry outcomes with wider EDC divisional and City strategic priorities.
- *Action 4.2: Ability to Compete:* Increase the Toronto Film Office's ability to meet expectations and standards common to competing film commissions related to its responsibility as the marketing and outreach entity for Toronto's industry in the international marketplace.

#### **Strategic Alignment with City Priorities**

Through the 4 strategic priorities, *Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030* provides City Council with an opportunity to support the local film industry while advancing various key City priorities, including:

- Priorities and actions set out in *Sidewalks to Skylines: An Action Plan for Toronto's Economy*, which calls to grow Toronto's global competitiveness in key anchor and high-productivity sectors, highlighting creative industries such as film. Additionally, through its workforce development efforts, it also advances actions (Actions 4, 16 and 17) to reduce barriers to economic inclusion, build opportunities for Toronto's youth, foster industry and academia partnership, and advances climate actions and adoption of green technology (Action 10 and 25).
- Priorities, objectives, and actions set out in *Culture Connects: An Action Plan for Culture in Toronto*, which notes the need for sector-specific strategies for shaping new policies, programs, and investments in growing industries including film, to promote Toronto talents and industry locally, nationally and internationally (Objective 4.1), to facilitate greater engagement, export and international

collaboration for culture and creative industries (Objective 4.2) and to track, understand, and tell the story of culture through robust research and data (Objective 3.2). It also supports the City's commitment of achieving one million square feet of new cultural space in Toronto over the next decade.

- Actions set out in the *Mayor's Economic Action Plan in Response to United States Tariffs*, which identifies the creative industries as a high growth sector and notes the importance of market diversification and the need to expand global markets for local key industries to stay current, competitive and informed with respect to evolving technology including AI.
- Actions identified in the *TransformTO NetZero Strategy*, which advance climate action and encourage the adoption of green technologies.

## Monitoring & Metrics

EDC will monitor the progress of the film industry in Toronto, and the impact of the actions described in the proposed Film Strategic Plan through the metrics outlined in Attachment 1. Using a comprehensive approach, two types of metrics will be monitored and leveraged to inform the implementation of the Film Strategic Plan:

- Metrics on the performance of the Film Office in delivering each action that is part of the Film Strategic Plan —this includes clear targets such as 90% or more film permits processed within 48-hour service, 80% or higher satisfaction rate in surveys for production clients, and ensuring increasing industry participation in City-led missions annually; and,
- Metrics on the film sector in Toronto—these include monitoring production volume, labour gaps analyses, and amount of studio space in Toronto.

It is expected that this robust monitoring and metrics framework, based both on the Film Office's ability to implement the actions and on the performance of the film sector in Toronto will help ensure the success of *Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030*.

## Next Steps

*Toronto's Screen Future: A Strategic Plan for Continued Growth 2025-2030* is informed by extensive industry stakeholder consultation and in-depth research and analysis into the current state of the film industry. Grounded upon the 4 strategic priorities, the Strategic Plan builds on Toronto's various existing strengths and represents the City's commitment to continue supporting the local film industry to drive growth and deliver new opportunities in consideration of the changing landscape of the industry. The implementation of the Film Strategic Plan will be managed by EDC and progress updates on its implementation and the state of the industry will be presented to the Film, Television and Digital Media Advisory Board and onward to the Economic and Community Development Committee and City Council as appropriate.

## **CONTACT**

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Patrick Tobin, General Manager, Economic Development and Culture,  
[patrick.tobin@toronto.ca](mailto:patrick.tobin@toronto.ca), 416-392-4166

## **SIGNATURE**

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Patrick Tobin, General Manager, Economic Development and Culture,  
[patrick.tobin@toronto.ca](mailto:patrick.tobin@toronto.ca), 416-392-4166

## **ATTACHMENTS**

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Attachment 1 – Toronto’s Screen Future: A Strategic Plan for Continued Growth 2025-2030